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BIP Security: How to Grant Selective Access to Creating and Editing Data Models

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Purpose

As of Release 8 of Oracle Fusion Applications, to create new content with the Business Intelligence Publisher (BIP), users need to have the **BI Author application role**, which grants them permission to create and edit reports and data models. Some organizations desire to grant the privilege to create and edit data models only to a subset of the users that can create reports. This document outlines modifications to implement this requirement.

Use Case

PC Systems is a hardware manufacturing company that is using Oracle Fusion Financials, OTBI and BIP. They categorize their users as follows:

- » Super Users – Authorized to create and edit reports and data models
- » Savvy Users – Authorized to create reports
- » Casual Users – With read only access without permissions to create reports or data models

Notice that the super and savvy users need the BI Author role to be able to create and edit reports. They also need this role if they are going to create and edit Business Intelligence analysis, such as those from OTBI. The modifications explained in the following show how to remove from the BI Author role the privilege to create data models and how to relocate it to another role.

Solution

In a nutshell the solution follows these steps: Create a copy of the **BI Author** role. Call it **BI Author Vanilla**. This is optional and intended to keep an untouched copy of BI Author role. Modify the existing **BI Author** role and remove from it the **oracle.bi.publisher.developDataModel** permission. With this change users with the BI Author role will lose the privilege to create and edit data models. Create role **Advanced BI Author** role and assign to it the **oracle.bi.publisher.developDataModel** permission. Place this role in a new group and make super users a member of it. This will grant super users exclusive privilege to edit and create data models.

User	BI Author Group	Advanced BI Author Group
Super User	X	X
Savvy User	X	

[X] – Role assigned to user

Notice that with this solution the organization does not have to change the user’s existing group memberships.

Before continuing the discussion, it is important to understand the permissions which Oracle delivers with the product to manage the privileges to create reports and data models. They are explained in the following table.

Permission	Description
<code>oracle.bi.publisher.developDataModel</code>	<ul style="list-style-type: none"> » Grants permission to create or edit data models » Grants permission to create reports based on Excel files and OTBI/OBIA subject areas
<code>oracle.bi.publisher.developReport</code>	<ul style="list-style-type: none"> » Grants permission to create or edit reports, style templates, and sub templates. This permission also enables connection to the BI Publisher server from the Template Builder. » Users with this permission can only create reports based on existing data models. They cannot create reports based on Excel files or OTBI/OBIA subject areas. They cannot create data models

Note that the `oracle.bi.publisher.developDataModel` permission also controls access to creating reports from Excel and BI Subject Areas. As you implement this solution, the super users will keep the privilege to create reports from these two sources, but the savvy users will not.

Implementation Steps

- » Log into the **Weblogic Administration Console** with administration privileges. Navigate from the Home page to Security Realms > [Relevant Security Realm] > Users and Groups.
- » Create a new group, called “**Advanced BI Author**”



Figure 1 - Creating a new group in the Weblogic Administration Console

- » Log into the **Fusion Middleware Enterprise Manager** with administration privileges
- » Navigate to Weblogic Domain
- » Navigate to Security>Application Roles

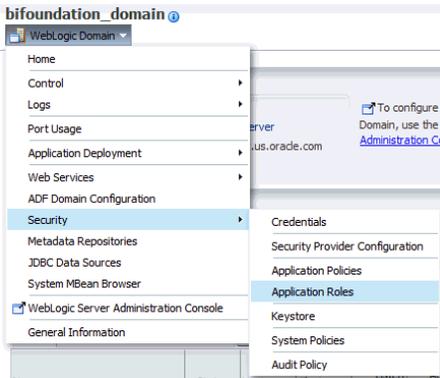


Figure 2 - Navigating to the screen to manage application roles

- » Create a new role called **BI Author Vanilla**. This is your untouched copy of the BI Author role.



Figure 3 - Creating the BI Author Original role

- » In the same Applications Role screen (Figure 3), create a new application role called the **Advanced BI Author** and associate it with the Advanced BI Author Group.

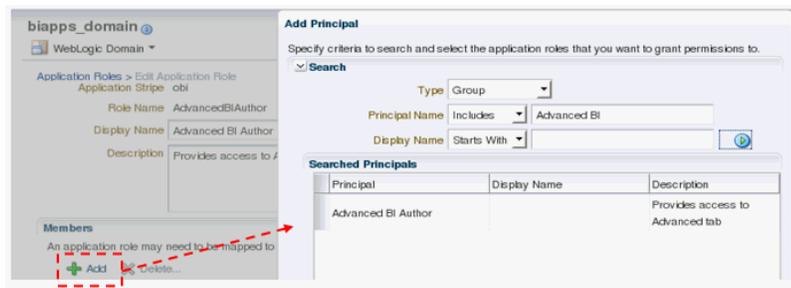


Figure 4 - Associating a role with a group in the Enterprise Manager

- » Navigate to Security>Application Policies (Same menu as Figure 2)
- » Search for **BI Author**
- » Click the button to “Create Like”. This creates a copy of the permissions assigned to **BI Author**. Grant them to the **BI Author Vanilla** role. Save your changes

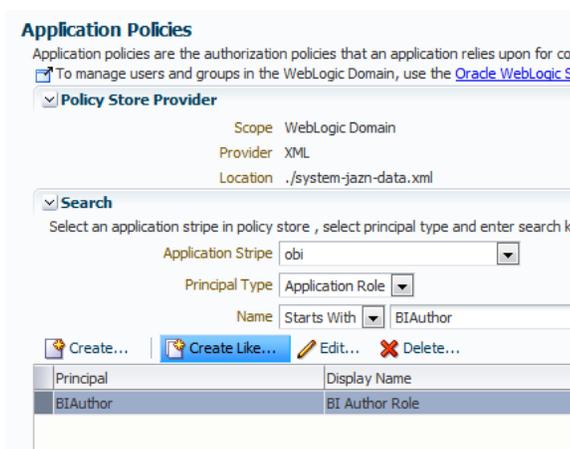


Figure 5 - Assigning to BI Author Vanilla same permissions as BI Author. Step 1: Select BI Author as the set of permissions to copy



Figure 6 - Assigning to BI Author Original the same permissions as BI Author. Step 2: Click “Add” and select BI Author Original.

- » In the Policy Store screen (Figure 5), look for the **BI Author** role
- » Edit this role and delete from it the **oracle.bi.publisher.developDataModel** permission. Save your changes.

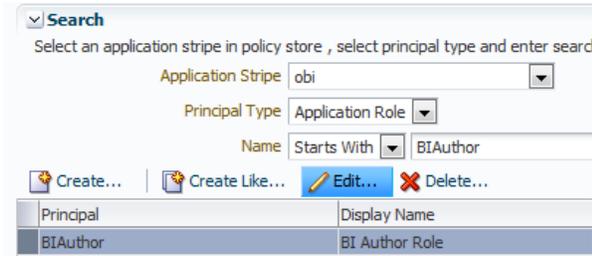


Figure 7 - Editing the BI Author role. Step 1: Edit the role

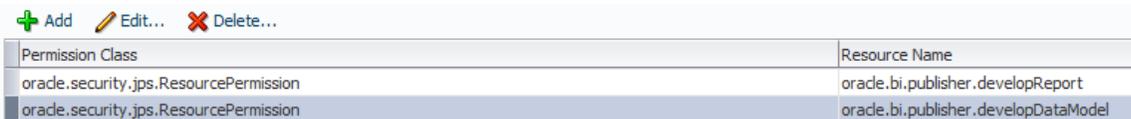


Figure 8 - Editing BI Author Role. Step 2: Delete the permissions

- » In the Policy Store screen (Figure 5), look for the **Advanced BI Author role**
- » Edit this role and add to it the **oracle.bi.publisher.developDataModel** permission. Save your changes (These are the same screens as Figure 7 and 8)
- » Login back into the Weblogic Administration Console and make super users members of the Advanced BI Author group.

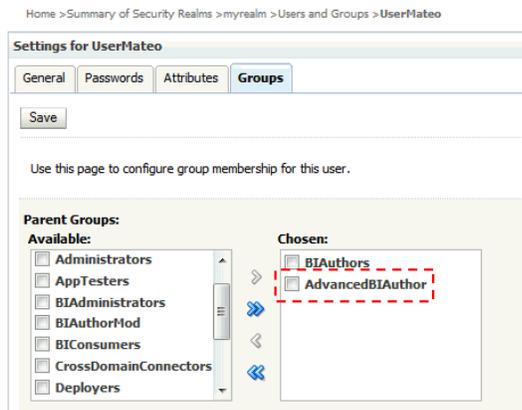


Figure 9 - Making users a member of a group with the Weblogic Administration Console

Results

In Answers, savvy users will see the following BIP menu items, which do not include the option to create data models.

Published Reporting

- Report
- Report Job
- Style Template
- Sub Template

Figure 10 - BIP menu items - savvy user

The report creation wizard will only show the option to create reports based on existing data models.

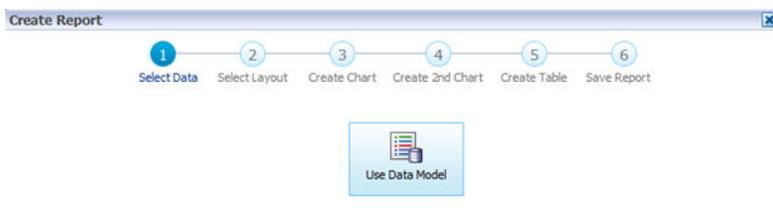


Figure 11 - BIP report sources - savvy user

In Answers, super users will see the option to create data models.

Published Reporting

- Report
- Report Job
- Data Model
- Style Template
- Sub Template

Figure 12 - BIP menu items - advanced user

The report creation wizard will show the option to create reports from data models, Excel and subject areas.

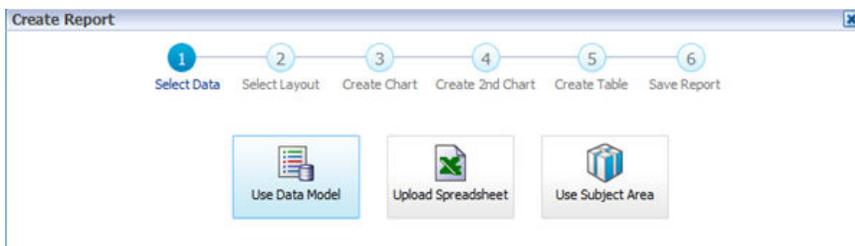


Figure 13 - BIP report sources – super user



Implementations Using External Authentication Mechanism

The instructions in this document assume that the Business Intelligence implementation uses Weblogic's LDAP for authentication and so, the Weblogic Administration Console tools are used to create security groups, as already shown. If the implementation uses an external LDAP, then the steps completed within Weblogic Administration Console need to be completed either with the LDAP directory's own administration tools or a third party LDAP tool, like JXPlorer.

Useful References

- » Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition: Introduction to Security in Oracle Business Intelligence

http://docs.oracle.com/cd/E28280_01/bi.1111/e10543/intro.htm#BABHDGGB

- » Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition: Understanding the Default Security Configuration

http://docs.oracle.com/cd/E28280_01/bi.1111/e10543/install.htm#CIHJBBGH



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